

Microsoft Greece

An exciting trip in Innovation and Entrepreneurship

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Microsoft Greece Vision

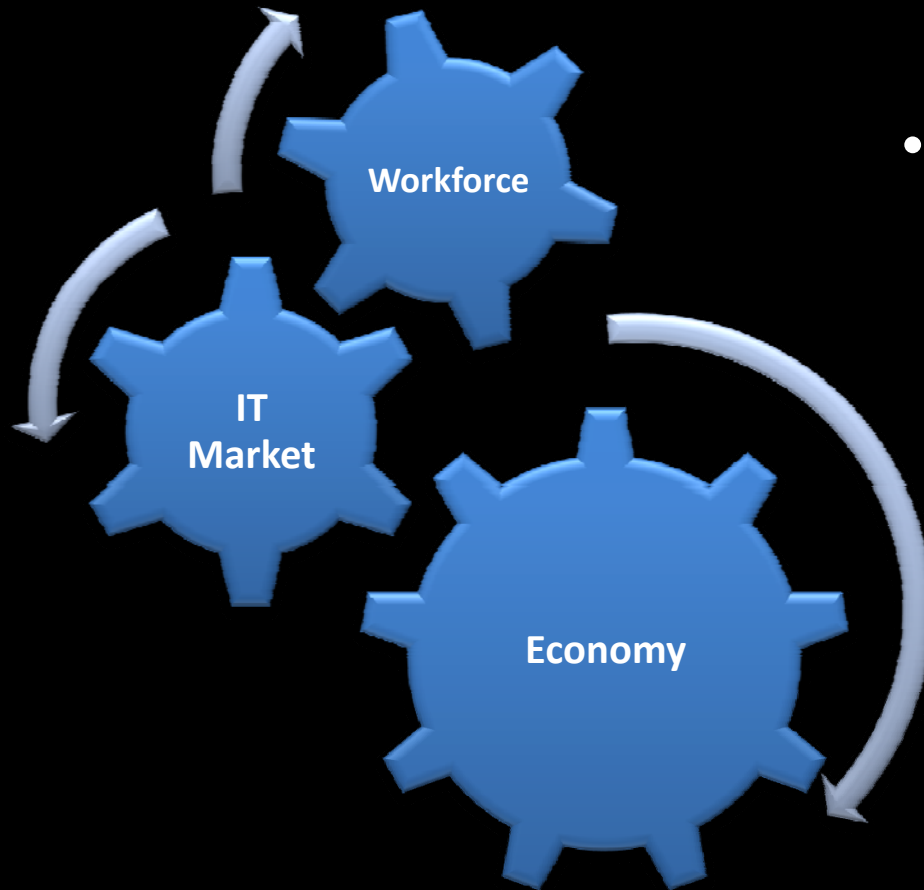
“To help Greece build a knowledge economy through the value of software”



Microsoft in Greece

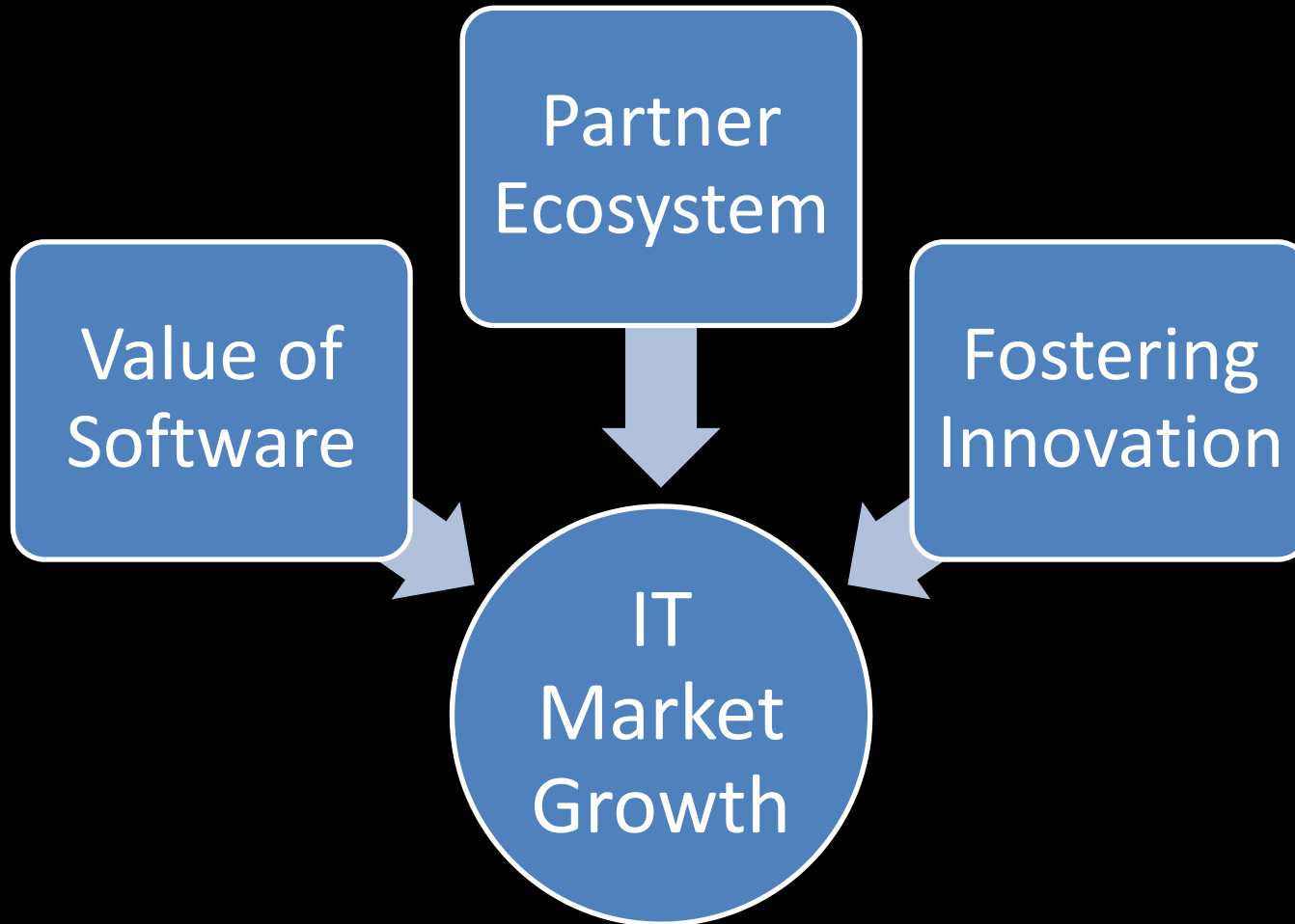
- Established in 1992 with 4 employees
- Currently employing 200 people
- Local Ecosystem of 3200 partners, distributors & resellers
- 72% Microsoft technology platform adoption across all software developer audiences
- Leading Enterprise Vendor in Greece

External Factors of Success



- **Economy**
 - **GDP growth** at 2% in 2008 above EU averages
 - **Turnover and EBIT** in IT up 31% and 56% (2005 - 2008)
- **IT Market**
 - **Broadband growth** 2007 & 2008 at 106.4% and 51.1%
 - **Converged Mobile Device Penetration** at 15% est. to reach 39.4% by 2011
 - **PC shipments growth** 2008 at 15% 3-year CAGR to FY11 estimated at 14.6%;
 - **Business Software Piracy Rate** at 58% reduced from 64% in 2005; all-up anti-piracy opportunity estimated at \$ 198m;
- **Workforce**
 - **STEM students** 25k in 41 IT Departments
 - Strong pool of young innovators & entrepreneurs (Several Top Imagine Cup projects)
 - High caliber of executives in the private sector

Shaping Market Growth



Engagement Milestones



2005:
Partners in
Learning

2006:
Unlimited
Potential
Program
Launch

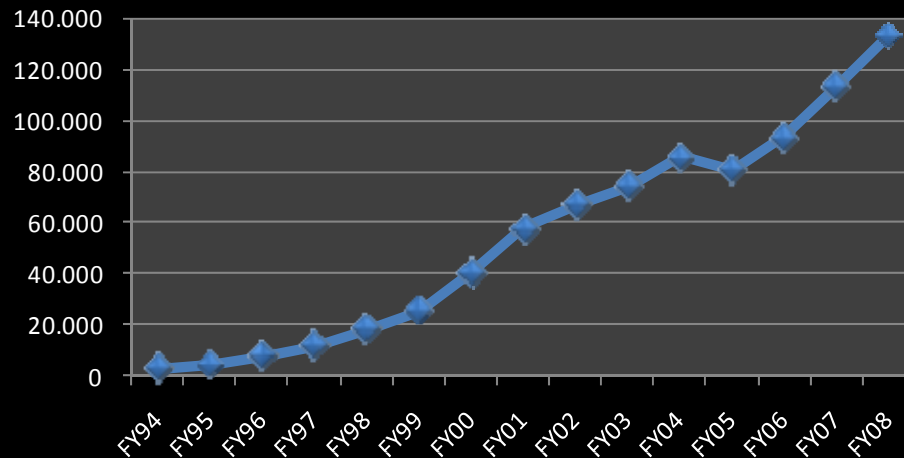
2006:
Strategic
Partnership
Agreement

2008:
Microsoft
Innovation
Center

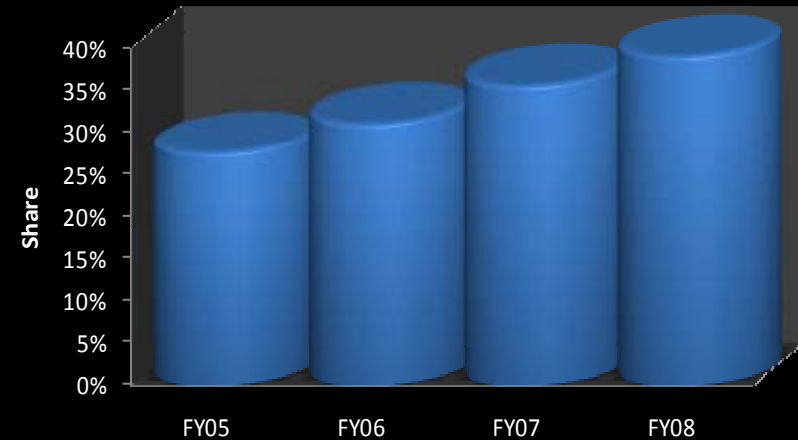


Most Recent Achievements

Greece Billed Revenue



Microsoft Hellas Software Market Share



- **Revenue Growth** 2nd WW (1994-2008) among medium mature Subsidiaries
- **Profitability** 3rd Worldwide within Microsoft in 2008
- **Market Share** 40% of Software Market - Rank 2nd in EMEA
- **Operational Excellence** 4th Worldwide within Microsoft in 2008
- **Microsoft Footprint** For every euro of Microsoft revenue, 15.49 euro are generated by the Microsoft ecosystem
- **Employee Satisfaction** 2nd Best Workplace award in Greece 2007 & 2008

Challenges & Opportunities

Challenges

Financial crisis impact on
Real Economy: Purchasing
power & Consumer
Confidence

Absorption of the 4th CSF EU
Fund

Maturity of IT Market

Opportunities

Household PC & Broadband
Penetration

Business Software Piracy
Reduction

Public Sector Modernization

Technology in the service of
corporate governance

Microsoft Hellas Aspirations

- Accelerate local innovation and improve relevant country ranking through the Microsoft Innovation Center
- Connect Entrepreneurship/employability to Innovation through our Unlimited Potential Initiative
- #1 WW in Customer & Partner Experience
- Sustain levels of Market Share in a growing IT economy
- Strengthen Microsoft Brand equity in the consumer space

Thank You

Microsoft[®]

Your potential. Our passion.[™]